MUSIC USA 1991

THE

AMERICAN MUSIC

CONFERENCE'S 1991

STATISTICAL REVIEW

OF THE U.S.

MUSIC INDUSTRY WITH

HIGHLIGHTS OF AMC'S NEW

U.S. AMATEUR MUSICIANS

SURVEY

THE AMERICAN MUSIC CONFERENCE

WHAT IS AMC?

The American Music Conference, a national non-profit educational association, was founded in 1947 to encourage active amateur music-making and music education for people of all ages. Members include major musical instrument manufacturers, retailers, wholesalers, music industry and music education associations, educational institutions, individuals, and others.

AMC's ten-fold mission is to:

- Educate the general public about the benefits of music in education, recreation and cultural activities.
- Encourage the support, continuation and improvement of the standards of music education in schools.
- Increase appreciation of the value of music in the home, as an avocation and as a character-building activity for youngsters.
- Encourage adult instrumental and choral participation.
- Further interest in and attendance at professional entertainment and cultural performances.
- Promote the use of music in industry and therapy.
- Advise and counsel governmental agencies that may engage in the support of community and other musical activities.
- Give recognition to personal effort, distinguished service and leadership in developing musical activities.
- Acquire and disseminate information, undertake studies and surveys, produce publications and publicity, sponsor competitions.
- Cooperate with and support other organizations in the development and advancement of music and musical activities.

WHAT DOES AMC DO?

As the public relations and research arm of the entire U.S. music industry, AMC's ongoing programs in support of its mission include:

Consumer Publicity
Publicizing the benefits of music-making and music education with a variety of messages that reach millions of Americans each year through stories carried by national wire services and newspapers, television and radio broadcasts, cable television programs, consumer magazines, industry and music educator trade publications and other print media.

Statistical Reporting
Collecting and disseminating statistical information through MUSIC USA, the music industry's only ongoing annual review of domestic and foreign manufacturers' shipments (at retail value) of traditional and electronic instruments, printed music and accessories.

Consumer Research
Conducting national consumer research into Americans' attitudes toward music-making and music education and trends in musical instrument usage.

Music Family Award
Encouraging and recognizing family togetherness and music-making in the home and community with the annual AMC "Amateur Music Family of the Year" award.

Information Source
Serving as the source which governmental agencies, educators, news media, financial analysts, advertising agencies and the public rely on for information about music-making and the music industry.

WHO DOES AMC REPRESENT?

AMC represents all members of the music industry and music educator communities in the U.S.; it does not promote individual companies, products or people within the industry.

WHO SUPPORTS AMC?

AMC is supported by the contributions of its members which include instrument and accessory manufacturers, retailers, wholesalers, distributors, publishers, suppliers, trade magazines, and other industry and music educator associations. Contributions are also accepted from music educators, musicians and other individuals who wish to help support the association's programs.

AMC MEMBER SERVICES

In addition to helping AMC spread positive, encouraging messages about music-making and education to America's general public, your contribution entitles you to:

- Six newsletters a year informing you about AMC's publicity results, award programs, research activities and other special projects.
- MUSIC USA, our annual statistical review which reports on manufacturer shipments at retail value in 14 different categories of instruments, printed music and accessories.
- Full written reports on new AMC-sponsored consumer attitude and usage research surveys available at special member rates.

HOW TO BECOME AN AMC MEMBER

For a very small investment in AMC, you will be helping support a wide range of activities which will return that investment many times over.

For more information about AMC membership and recommended contributions, please contact Paul Bjorneberg, Director, American Music Conference, 303 E. Wacker Drive, Suite 1214, Chicago, IL 60601, or call (312) 856-8820 or 856-8821.

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FROM THE PRESIDENT

"Since music has so much to do with the molding of character, it is necessary that we teach it to our children."

Aristotle
(320 B.C.)

Perhaps more than any time in recent memory, the past twelve months have seen major commitments by the U.S. music community to programs and projects that work toward not only ensuring our children have the opportunity to experience the joys of playing music, but which position the music education and teaching areas as worthwhile, respected career choices.

A few of the many efforts by the American Music Conference and other music-related associations during the past year have included:

- Expanded distribution of AMC's "Music and Your Child" brochure through a special test-market mailing to pediatricians, and publicity in outlets that directly reach parents.
- Development of a variety of new educational materials, such as "Exploring Careers in Music," a joint project between AMC and the Music Educators National Conference; a national survey of independent music teacher income and lesson fees by the Music Teachers National Association Foundation; and print and videotape support materials from the National Piano Foundation and National Association of Music Merchants.
- And most visibly, The National Symposium on America's Culture at Risk in Washington, D.C. (sponsored by NAMM, MENC and the National Academy of Recording Arts & Sciences, and supported by virtually every other music organization in the country) to draw attention to how music and the other arts, as basic components of children's education, can make major contributions to solutions of today's problems in society and education.

It is indeed gratifying to see this type of music community-wide commitment, support and cooperation for an issue that affects the cultural well-being of our children and our country.

On behalf of the American Music Conference, I would like to thank all those individuals and organizations who work to support America's music and music education.

And, special thanks to everyone (particularly the National Association of Music Merchants for its support of this publication) who supports AMC's ongoing programs, projects and commitment to educating and informing Americans about the importance of music and the arts.

Richard Knaub
President

MUSIC INDUSTRY SALES

How to Read the Data

All units and dollars in this annual review are based on shipments by manufacturers at estimated retail value. Imports, and in some cases exports, are included where noted.

To provide an indicator of actual sales at the music retailer level, this review also includes the results of the National Association of Music Merchants' (NAMM) ongoing survey of music stores around the country.

The total 1990 retail value of $3.5 billion represents in large part manufacturers' shipments sold through music stores. However, in the past several years, the numbers of different outlets selling musical instruments have increased, particularly with the popularity of electronics. Therefore, in categories where it is appropriate, dollar figures also include estimated sales through mass merchandisers, major audio chains, direct mail companies, department stores, and direct to consumers by manufacturers, publishers or distributors.

It should be noted that retail dollar estimates in this report are based on shipments to retailers which may or may not have been sold to consumers each year. The sources of these figures vary widely depending on the availability of a reporting mechanism, the nature of the mix of U.S.-made instruments and imports, and whether the category consists of mostly imported instruments that may or may not be correctly classified by the U.S. Customs Department.

Only three categories in this review are based on organized but voluntary reporting systems, and even within these categories (pianos, woodwind and brass instruments), estimates have been made for manufacturers who do not report their shipments. Government reporting categories for all imported electronic keyboards are unclear, and therefore, determining the exact number of units that properly belong in the organ category, as opposed to portable and other electronic keyboards, continues to be a particular challenge.

In the category of printed music, figures are based on best estimates of experts in this segment of the industry using as a baseline a 1990 survey by the National Music Publishers Association.

String data has been analyzed by industry experts who have tracked both domestic manufacture and imports.

In categories where there are no applicable import schedules and no reporting system, a representative number of manufacturers have been interviewed to arrive at a consensus on the size of the market.

This review omits several manufacturing areas for which it is extremely difficult to compile any data, including kits for assembly of instruments, harps, a variety of inexpensive instruments used in elementary education, musical toys, and estimates for craft production other than for bowed string instruments. There is also a brisk market for used or rental instruments which AMC does not follow.

Imports/Exports

Imports are figured into all relevant categories; exports are included only where indicated.

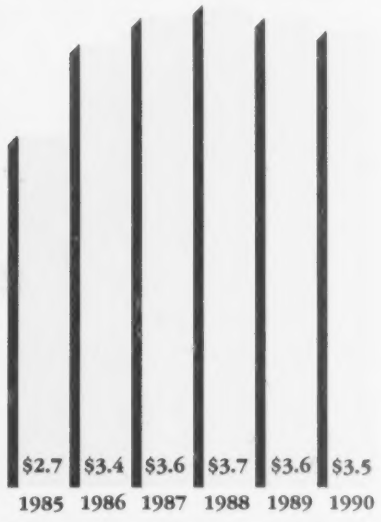
Determining the exact number of units made and sold domestically is becoming more complex each year due to the changing nature of imports. For example, some foreign manufacturers are shipping parts from abroad and assembling in the United States, some have built plants here. Government reporting categories, amplified in 1989, still are inadequate to provide a clear view of exactly what types of electronic instruments are being shipped to the U.S.

The data that appears in this statistical review represents several months of intensive discussions and work with a great many music industry experts. I would like to thank all of those men and women for their help, the insights they provided, and the time they have devoted to helping compile this information.

Paul Bjorneberg
Editor

1990 Retail Value of New Musical Instruments, Sheet Music, and Musical Accessories Down 2 Percent to $3.5 Billion

Music Industry Retail Dollars 1985–1990 (Billions)

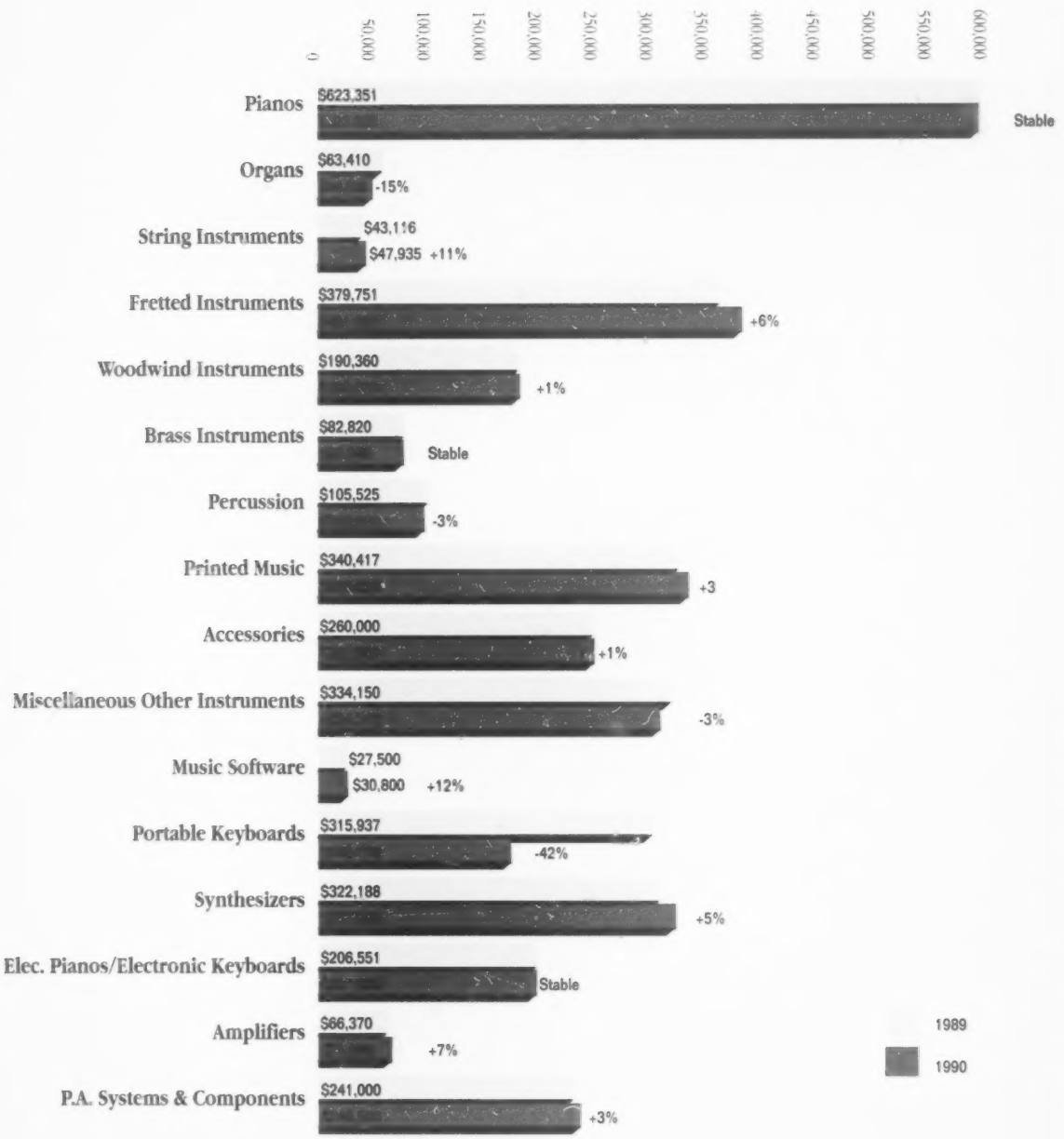


	Music Industry Retail Value	Personal Consumption (Billions)	Percent of Personal Consumption[3]	Gross National Product (Billions)	Cost Living Index 1967=100
1990	$3,520,860,000	$3,657.3	0.096%	$5,465.1	391.4
1989	3,602,446,000	3,471.1	0.104%	5,234.0	371.3
1988	3,716,140,000	3,227.5	0.115%	4,864.3	354.3
1987	3,677,747,000	3,012.1	0.122%	4,526.7	340.4
1986	3,344,957,000	2,762.5	0.121%	4,206.1	328.4
1985	2,697,900,000	2,582.1	0.104%	3,989.1	322.2
1984	2,496,333,000	2,342.3	0.107%	3,661.3	311.1
1983	2,346,247,000	2,157.0	0.109%	3,310.8	298.4
1982	2,207,745,000	1,971.1	0.112%	3,059.3	289.1
1981	2,375,610,000[4]	1,857.8	0.128%	2,924.8	272.4
1980	2,180,800,000	1,672.8	0.130%	2,626.1	246.8
1979	2,353,609,000	1,509.8	0.156%	2,368.6	217.4
1978	2,299,690,000	1,340.1	0.172%	2,107.6	195.4
1977	2,090,204,000	1,260.2	0.166%	1,963.7	181.5
1976	1,919,010,000	1,079.7	0.178%	1,691.6	170.5
1975	1,741,977,000	963.8	0.180%	1,498.9	161.2
1974	1,821,353,000	877.0	0.207%	1,396.7	147.7
1973	1,524,427,000[1]	804.0	0.189%	1,289.1	133.1
1972	1,306,179,000[2]	721.0	0.181%	1,151.8	125.3
1971	1,106,339,000	662.1	0.167%	1,046.8	121.3
1970	1,005,239,000	616.7	0.163%	976.5	116.3
1969	957,020,000	577.5	0.167%	931.4	109.8
1968	954,138,000	536.6	0.177%	865.7	104.2
1967	924,000,000	491.7	0.187%	785.0	100.0
1966	955,000,000	469.9	0.205%	739.6	97.2
1965	887,000,000	428.7	0.206%	676.3	94.5
1964	731,000,000	398.9	0.183%	626.7	92.9
1963	661,000,000	373.8	0.177%	589.2	91.7
1962	608,000,000	355.1	0.170%	500.3	90.6
1961	538,000,000	335.1	0.160%	520.1	89.6
1960	500,000,000	325.2	0.154%	503.8	88.7
1955	380,000,000	254.4	0.150%	398.0	80.2
1950	235,000,000	191.0	0.124%	284.8	72.1
1941	90,000,000	80.6	0.111%	124.5	44.1

1. *For comparable figure in 1972, add $8,000,000 for non-reporting piano manufacturers previously not recorded, and $21,881,000 for higher sheet music shipments. Includes a new category—synthesizers.*
2. *Includes a new category—electric pianos.*
3. *To be read as a fraction of 1%.*
4. *Includes a new category—portable keyboards—plus revised estimates for several categories.*

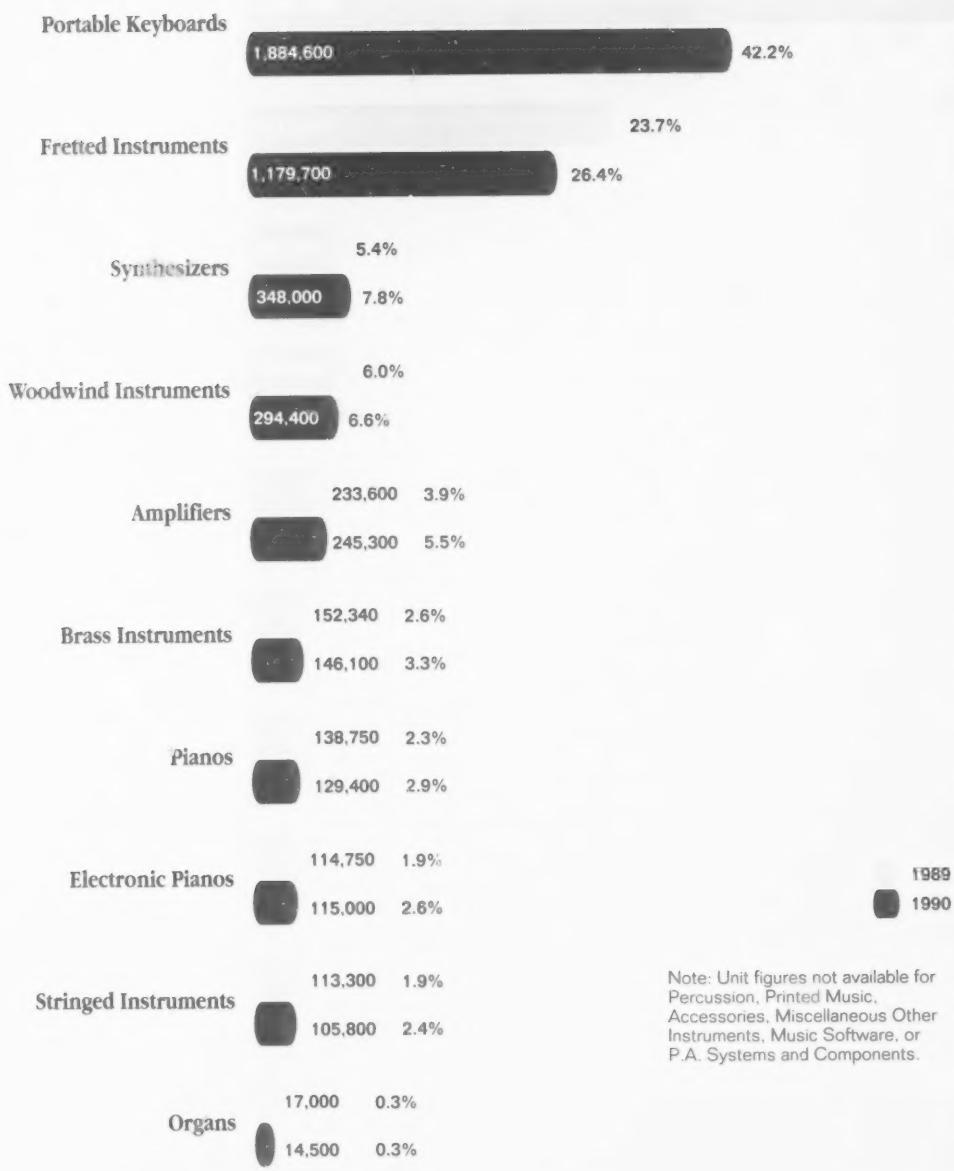
Note: Government statistics on gross national product, personal consumption are revised annually. The figures noted on this chart are those available in May of every year when Music U.S.A. is compiled.

MUSIC USA
PRODUCT CATEGORIES
TOTAL DOLLAR COMPARISONS
1989-1990 (IN MILLIONS)



How the Musical Instrument Market is Divided:

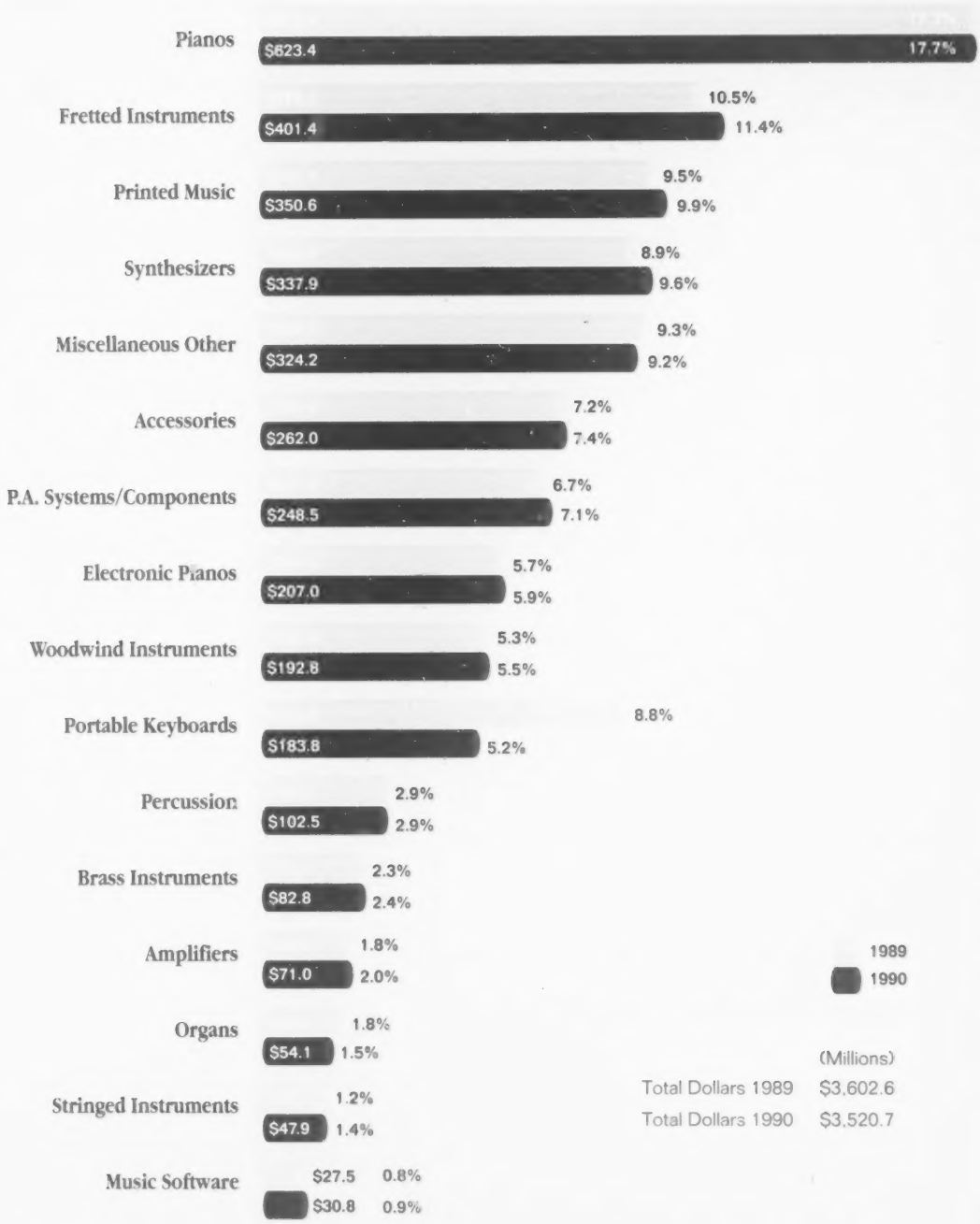
Units (Rounded)



Note: Unit figures not available for Percussion, Printed Music, Accessories, Miscellaneous Other Instruments, Music Software, or P.A. Systems and Components.

How the Musical Instrument Market is Divided:

Dollars (in millions, rounded)



PIANOS

Includes: Domestic production, imports and exports. Player pianos are also included. Electric pianos are categorized separately.

Total acoustic piano units were down 7% in 1990, while total dollars remained steady. Grand pianos (which accounted for 55% of the category's total dollars, compared to 53% in 1989) were up 4% in dollars and units were steady. Imported verticals were off 6% in units and 2% in dollars. All verticals, combined, dropped 9% in units and 5% in total dollars.

Pianos

	Units	Dollars[1]
1990	129,415	$623,388
1989	138,745	623,351
1988	162,861	683,616
1987	174,993	682,725
1986	166,555	619,763
1985	151,300	480,690
1984	180,000	526,100
1983	197,000	454,345
1982	203,000	421,682
1981	231,000	458,304
1980	233,000	424,060
1979	275,600	452,000
1978	282,172	411,971
1977	258,918	345,914
1976	246,235	303,608
1975	217,329	260,795
1970	193,814	164,000
1960	198,200	148,650
1950	172,531	125,000
1940	136,332	95,000

[1] *In thousands of dollars.*
Source: National Piano Manufacturers Association and industry estimates.

ORGANS

Includes: Domestic production and imports with retail value of $1,000 and up. Exports are not included.

Units and dollars both dropped nearly 15% during 1990. Industry sources reported a stable market for higher-priced instruments.

Organs

	Units	Dollars[1]
1990	14,500	$54,085
1989	17,000	63,410
1988	25,500	95,162
1987	35,200	121,608
1986	40,000	140,000
1985	49,600	156,300
1984	58,000	174,000
1983	88,000	257,000
1982	101,000	249,000
1981	131,329	323,463
1980	138,724	339,000
1979	175,159	398,487
1978	199,654	478,770
1977	222,400	510,186
1976	217,267	462,779
1975	205,772	395,700
1970	137,500	215,400
1960	106,000	141,400
1950	10,000	14,000
1940	NA	NA

[1] *In thousands of dollars.*
Source: International Association of Electronic Keyboard Manufacturers, U.S. Tariff Commission and industry estimates.

STRING INSTRUMENTS

Includes: Imports and domestic production of violins, violas, cellos and basses.

Units dropped 7% in 1990, while dollars rose 12%, reflecting increases in the value of imports, the bulk of this category's units. Imports from Asia (Japan, Korea, Hong Kong and Mainland China), which represent approximately 27% of the category's total dollars, were up nearly 25% in value. Domestic production was up approximately 13% in both units and dollars during 1990.

String Instruments

	Units	Dollars[1]
1990	105,800	$47,935
1989	113,300	43,116
1988	114,600	42,097
1987	102,740	40,144
1986	86,950	32,029
1985	70,000	26,138
1984	97,500	32,318
1983	93,000	30,000
1982	120,000	38,200
1981	109,500	36,300
1980	94,000	38,000
1979	92,000	39,330
1978	83,500	36,500
1977	75,000	25,200
1976	83,000	25,400
1975	91,225	28,000
1970	75,700	19,720
1960	40,600	7,300
1950	NA	NA
1940	NA	NA

[1] *In thousands of dollars.*
Source: U.S. Tariff Commission and industry estimates.

FRETTED INSTRUMENTS

Includes: Domestic production and imports. Exports are not included.

Total units for fretted instruments were down 17% in 1990 and dollars were up 6%. Imported acoustic and electric guitars, combined, dropped 18% in units, but increased 8% in dollars. Domestic production was up 1% in units and 2% in dollars. Industry sources reported a solid market among buyers trading up to higher-end units.

Fretted Instruments

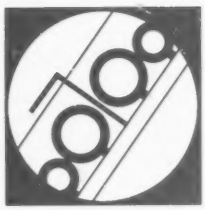
	Units	Dollars[1]
1990	1,179,700	$401,424
1989	1,415,500	379,751
1988	1,422,355	412,325
1987	1,247,265	328,322
1986	1,121,235	302,033
1985	1,056,152	271,636
1984	994,607	236,000
1983	875,106	214,500
1982	1,213,138	252,805
1981[2]	1,332,550	320,417
1980	1,102,041	226,402
1979	1,890,006	301,957
1978	1,872,185	277,464
1977	1,655,572	238,932
1976	1,758,000	245,152
1975	1,540,234	185,036
1970[2]	2,214,686	159,910
1960	420,000	35,000
1950	220,000	22,000
1940	190,000	10,000

[1] *In thousands of dollars.*
[2] *These years also include estimates of amplifier and P.A. system shipments.*
Source: U.S. Tariff Commission and industry estimates.

Fretted Instruments

	1990		1989		1988	
Domestic	Units	Dollars	Units	Dollars	Units	Dollars
Includes non-electric guitars, electric guitars and other fretted instruments[1]						
Domestic Total ($ rounded)	136,000	$131,500,000	135,000	$129,511,000	141,000	$118,213,000
Imports						
Non-electric guitars	452,130	$103,412,000	556,000	$110,016,000	652,419	$107,500,000
Electric guitars	390,830	153,516,000	468,284	128,100,000	485,135	174,460,000
Other fretted[2]	200,740	12,996,000	256,148	12,124,000	143,801	12,152,000
Import Total ($ rounded)	1,043,700	$269,924,000	1,280,500	$250,240,000	1,281,355	$294,112,000
Grand Total ($ rounded)	1,179,700	$401,424,000	1,415,500	$379,751,000	1,422,355	$412,325,000

[1] *Includes domestic production of acoustic and electric guitars and banjos, ukuleles and mandolins.*
[2] *Includes banjos, ukuleles and mandolins.*



WOODWIND INSTRUMENTS

Includes: Domestic production as well as imports. Exports are not included.

BRASS INSTRUMENTS

Includes: Domestic production as well as imports. Exports are not included.

PERCUSSION

Includes: Domestic production of drums sold in sets, as marching band equipment; mallet instruments, and cymbals. Imports are included and exports are not.

Woodwind and brass units both were down 2% compared to 1989, and up 1% and 2%, respectively, in total dollars.

Industry sources reported increased demand for flutes and piccolos; a stable market for trombones, trumpets and clarinets; and lessening consumer demand for saxophones.

It should be noted that 1990 figures represent the findings of the National Association of Band Instrument Manufacturers' new standardized reporting system. It should also be noted that 1989 unit and dollar figures for both categories have been adjusted (from those previously reported) to more accurately reflect that year's markets.

The percussion market was down 3% in 1990. According to industry sources, prices remained steady, while imports, which represent the majority of this category, were down due in part to the weakness of the U.S. dollar against foreign currencies.

Woodwind Instruments

	Units	Dollars[1]
1990	294,400	$192,839
1989	306,700	191,704
1988	354,800	179,587
1987	346,996	171,035
1986	326,500	158,000
1985	309,800	141,390
1984	303,000	136,071
1983	326,000	142,055
1982	343,000	142,345
1981	345,000	135,515
1980	321,000	117,000
1979	328,000	114,400
1978	340,000	108,800
1977	337,400	100,498
1976	343,245	96,452
1975	359,000	94,417
1970	304,000	66,150
1960	241,000	45,300
1950	122,000	17,000
1940	110,000	6,000

[1] *In thousands of dollars.*

Source: National Association of Band Instrument Manufacturers and industry estimates.

Brass Instruments

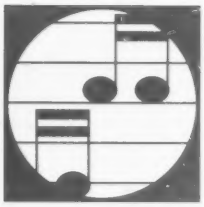
	Units	Dollars[1]
1990	146,100	$82,848
1989	148,800	81,116
1988	152,335	78,132
1987	146,475	74,411
1986	139,500	69,150
1985	144,600	67,600
1984	143,000	65,544
1983	165,000	73,347
1982	168,000	71,064
1981	201,500	81,205
1980	197,000	74,800
1979	220,000	80,300
1978	229,000	76,715
1977	234,060	72,692
1976	238,600	70,000
1975	253,000	69,322
1970	225,000	51,000
1960	153,000	29,700
1950	85,000	13,000
1940	75,000	6,000

Percussion

	Dollars[1]
1990	$102,500
1989	105,525
1988	105,525
1987	100,500
1986	90,000
1985	83,000
1984	82,000
1983	78,000
1982	78,475
1981	82,914
1980	69,017
1979	70,426
1978	61,240
1977	56,700
1976	53,000
1975	48,361
1970	32,000
1960	12,000
1950	NA
1940	NA

[1] *In thousands of dollars.*

Source: National Association of Band Instrument Manufacturers and industry estimates.



PRINTED MUSIC

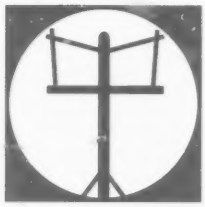
Includes: Domestic publishing of sheet music and self-instruction aids.

According to industry sources, strong demand for heavy metal, guitar, choral and piano methods instruction music and transcription books of all types contributed to this category's 3% increase over 1989.

Printed Music

	Dollars[1]
1990	$350,630
1989	340,417
1988	330,502
1987	308,880
1986	286,000
1985	275,000
1984	266,800
1983	253,000
1982	239,112
1981	236,900
1980	266,220
1979	261,000
1978	241,680
1977	228,000
1976	211,000
1975	197,750
1970	91,500
1967	72,000

[1] *In thousands of dollars.*
Source: National Music Publishers' Association and industry estimates.



ACCESSORIES

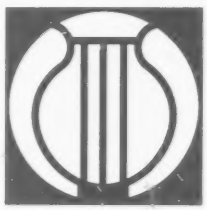
Includes: Estimates for sales of domestically made and imported strings, cases, straps, stands, drum sticks and other percussion accessories, reeds, metronomes, electronic pick-ups, distortion units and other types of electronic devices.

Slight increases in the majority of segments in this category contributed to an overall 1% increase in 1990. Guitar strings, the largest dollar volume segment, were up 3%. Reeds and other woodwind accessories showed the largest gain, up some 9%.

Accessories

	Dollars[1]
1990	$262,000
1989	260,000
1988	244,400
1987	230,700
1986	226,000
1985	208,000
1984	200,000
1983	198,000
1982	194,000
1981	194,500[2]
1980	247,000
1979	247,000
1978	236,000
1977	225,000
1976	217,967
1975	198,152
1970	108,400
1967	85,000

[1] *In thousands of dollars.*
[2] *Nearly $18 million of electronic accessories now included in "P.A. Systems and Components," and $15 million of cymbals moved to "Percussion" category.*
Source: Industry estimates



MISCELLANEOUS OTHER INSTRUMENTS

Includes: Imports of drums and other percussion instruments, electronic instruments such as rhythm machines, cymbals, mouth organs, pipe organs, harpsichords, accordions, hand held keyboards, organs valued under $400, and a variety of educational instruments.

Total dollars for this category, which includes 19 different types of imported instruments, were down 3% in 1990. Percussion instrument (drums, cymbals, and other percussion instruments) total dollars were up 3% and electronic instrument total dollars dropped 6%. Combined, percussion and electronics accounted for 59% of this category's total dollars, compared to 56% in 1989.

Miscellaneous Other Instruments

	Dollars[1]
1990	$324,242
1989	334,150
1988	345,274
1987	301,214
1986	226,954
1985	211,161
1984	166,000
1983	151,000
1982	80,000
1981	133,888
1980	124,000
1979	136,600
1978[2]	151,000
1977[2]	91,000
1976	84,258
1975	100,987
1970	78,509
1967	53,800

[1] *In thousands of dollars.*
[2] *Includes $7 million in 1978 and $6 million in 1977 for accordions and concertinas.*
Source: U.S. Tariff Commission

MUSIC SOFTWARE

Includes: Domestic production of sequencing, music notation or sound editing and librarian software products that allow for the creation or composition of music for the purpose of performance, recording or publishing.

According to industry sources, new technology (making computers more powerful and less expensive) and continued popularity of music notation and MIDI-sequencing software, contributed to a 12% increase in computer software sold through music stores during 1990.

This nearly $31 million, combined with an estimated $20 million to $30 million of music software sold through computer stores, mail order, catalogs, direct sales and some mass merchandising, brought the total dollars for music software to between $50 million and $60 million.

Music Software

	Dollars[1]
1990	$30,800
1989	27,500
1988	25,000
1987	20,000

[1] In thousands of dollars.
Source: Industry estimates.

PORTABLE KEYBOARDS

Includes: Imported keyboards with organ, synthesizer, or even electric piano characteristics that sell from under $100 to $1,000.

Total units and dollars in this category were down 39% and 42%, respectively, compared to 1989. Units retailing for under $300 decreased 37% and those units over $300 dropped 58%.

Continued competition from other electronic products, such as home video games, was reported as being a contributing factor to the decline in the lower-end units. In the higher-end market, sources reported that consumers were looking for more sophisticated features, such as good sound reproduction.

	Units	Dollars
Under $300	1,765,600	$139,419,000
Over $300	119,000	44,350,000
Total	1,884,600	$183,769,000

Portable Keyboards

	Units	Dollars[1]
1990	1,884,600	$183,769
1989	3,092,000	315,937
1988	4,255,400	401,158
1987	4,798,000	548,750
1986	2,500,000	526,500
1985	1,300,500	253,285
1984	534,000	193,000
1983	282,000	150,000
1982	NA	98,200
1981	NA	53 900[2]
1980	NA	7,586[3]

[1] In thousands of dollars.
[2] Included in Miscellaneous Other Instruments and in Portable Keyboards in 1981.
[3] Included in Miscellaneous Other Instruments in 1980.
Source: Industry estimates.

SYNTHESIZERS

Includes: Domestic production, imports and exports of keyboard type and drum synthesizers, sampling keyboards and sound modules.

During 1990, units were up 8% and dollars increased 5%. The market for entry-level and add-on buyers was reported steady. Sources also cited strong demand among computer hobbiests, churches and high school- and college-level educational institutions.

Synthesizers

	Units	Dollars[1]
1990	348,000	$337,900
1989	322,000	322,188
1988	361,800	303,040
1987	378,500	299,900
1986	350,500	275,000
1985	220,000	173,200
1984	134,700	136,000
1983	66,000	80,000
1982	43,000	50,000
1981	34,500	33,000
1980	36,606	32,300
1979	24,172	24,172
1978	24,050	24,050
1977	23,500	23,500
1976	18,000	17,100
1975	15,000	13,500
1974	10,000	11,000
1973[2]	7,000	8,000

[1] In thousands of dollars.
[2] First year for inclusion of this category.
Source: Industry estimates.

ELECTRIC PIANOS/ ELECTRONIC KEYBOARDS

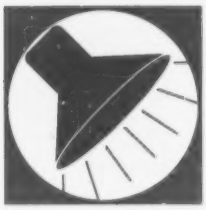
Includes: Domestic production, imports and exports. Instruments in this category are designed primarily to make a piano sound and have at least some similarity to piano action.

Units and dollars remained steady during 1990. Industry sources reported a strong demand among first-time purchasers and the church and school music program markets.

Electric Pianos/ Electronic Keyboards

	Units	Dollars[1]
1990	115,000	$207,000
1989	114,750	206,551
1988	108,255	181,868
1987	103,100	173,208
1986	84,000	134,400
1985	60,000	107,000
1984	50,000	50,000
1983	44,000	44,000
1982	40,000	40,000
1981	37,000	40,700
1980	40,000	40,000
1979	38,737	38,737
1978	25,000	25,500
1977	25,000	24,500
1976	23,300	19,600
1975	22,000	17,600
1974	21,000	14,700
1973	19,000	11,400
1972[2]	15,000	9,000

[1] *In thousands of dollars.*
[2] *First year for inclusion of this category.*
Source: Industry estimates.



SOUND REINFORCEMENT EQUIPMENT

Includes: Domestic production and imports sold through music stores. Exports are not included.

Guitar amplifiers increased 5% in units and 7% in dollars compared to 1989. Industry sources pointed to steady markets for mid-priced amplifiers among first-time and add-on purchasers.

P.A. systems and components rose 3% in dollars during 1990. Speaker systems (the largest dollar volume segment) were up 5%. Speaker systems and signal processors (the two largest dollar volume segments) combined accounted for 39% of the category's dollars.

Amplifiers

	Units	Dollars[1]
1990	245,300	$71,000
1989	233,600	66,370
1988	212,350	61,454
1987	200,300	58,250
1986	188,700	55,228
1985	170,000	51,500
1984	166,000	51,500
1983	157,000	50,000
1982	177,000	57,500
1981	177,000	63,860
1980	177,000	62,000
1979	177,000	68,200
1978	177,000	62,000
1977	161,000	48,000
1976	158,000	48,000
1975	154,000	50,000
1974	140,000	55,000
1973	133,980	53,592
1972	110,000	43,245

[1] *In thousands of dollars.*
Source: Industry estimates.

P.A. Systems and Components

(mikes, mixers, power amplifiers, speaker systems and components, signal processors)

	Dollars[1]
1990	$248,500
1989	241,000
1988	227,000
1987	215,100
1986	203,900
1985	192,000
1984	181,000
1983	171,000
1982	157,500
1981	175,000[2]
1980	121,000[3]
1979	121,000
1978	108,000
1977	100,000
1976	60,000
1975	53,000
1974	45,000
1973	11,246
1972	10,318

[1] *In thousands of dollars.*
[2] *Includes $18 million of electronic devices previously included in the "Accessories" category.*
[3] *Low estimate according to industry sources.*
Source: Industry estimates.

Music Industry Export Value Up 13%; Import Value Down 6%

Exports of U.S.-produced musical instruments, parts and accessories rose for the sixth consecutive year to surpass the quarter-billion dollar mark in 1990; the 13% increase brought total value of exports to $253,771,000, according to AMC's annual interpretive analysis of U.S. Department of Commerce data.

While total value of musical goods imported to the American market was down in 1990 to $592,000,000, the 6% decrease was substantially less than the 32% drop reported between 1989 and 1988.

The continued weakness of the U.S. dollar against foreign currencies was a contributing factor affecting both imports and exports during 1990.

1990 U.S. Exports of Musical Instruments and Parts

KEY: *Figures readjusted by AMC to more accurately reflect exports. Harmonized System Numbers for each category appear below each category listing. All values in thousands of dollars.

Category	1990 Units	1990 Value	1989 Units	1989 Value	1988 Units	1988 Value	1990 Leading Customers
Pianos[1] (HS9201.10000/9201.20000)	7,292*	$ 8,127*	8,415*	$ 8,027*	6,288*	$ 8,448*	Canada
Pipe & Reed Organs (HS9203.00000)	1,888*	$ 1,959*	3,848	$ 2,176	140	$ 448	Canada
Acoustic Guitars (HS9202.90300)	46,659	$ 13,287	76,422	$ 11,124	29,644	$ 8,065	Japan
Electric Guitars (HS9207.90004)	63,238	$ 15,151	63,985	$ 14,990	33,496	$ 10,312	Japan
Other Plucked & Bowed Strings[2] (HS9202.10000/9202.90600)	106,708	$ 17,791	95,990	$ 14,528	29,287	$ 4,180	Japan
Brasswinds (HS9205.10000)	62,262	$ 14,758	57,426	$ 14,917	64,319	$ 19,745	Canada
Woodwinds (HS9205.90100)	82,873	$ 17,752	83,811	$ 17,119	52,104	$ 8,295	Canada/Japan
Percussion (HS9206.00000)	N/A	$ 18,310	N/A	$ 14,758	N/A	$ 12,086	Japan
Synthesizers, Electric Pianos (HS9207.10002)	71,833	$ 15,153	62,565	$ 11,310	20,387	$ 12,188	Italy/W. Germany
Other Electronic Instruments[3] (HS9207.10008/9207.90008)	740,528	$ 46,666	872,328	$ 45,414	N/A	$ 63,360	U.Kingdom/Japan
Harpsichords, Clavichords (HS9201.90000)	8,158*	$ 2,011*	8,432	$ 2,700	2,240	$ 1,159	Japan
Other Instruments[4] (HS9204.10000/9204.20000/9205.90600)	N/A	$ 2,866	N/A	$ 3,925	N/A	$ 1,588	Japan
Fretted & Bowed String Instrs. Parts, Accessories[5] (HS9209.30000/9209.92000)	N/A	$ 31,242	N/A	$ 23,271	N/A	$ 11,540	Japan
Piano Parts, Accessories[6] (HS9209.91000)	N/A	$ 7,779	N/A	$ 7,203	N/A	$ 5,175	Mexico
Pipe & Reed Organ Parts, Accessories[7] (HS9209.93000)	N/A	$ 2,632	N/A	$ 2,733	N/A	$ 6,008	Japan/Mexico
Electronic Instruments Parts, Accessories[8] (HS9209.94000)	N/A	$ 11,357	N/A	$ 11,137	N/A	$ 6,281	Japan
Other Instruments Parts, Accessories[9] (HS9209.99000)	N/A	$ 25,562	N/A	$ 17,400	N/A	$ 23,078	Japan
Other Accessories[10] (HS9209.10000)	N/A	$ 1,368	N/A	$ 1,675	N/A	$ 5,770	Japan
TOTALS	N/A	$253,771	N/A	$224,407	N/A	$207,726	

1990 EXPORT FOOTNOTES

[1] *Uprights, Grands, Players. Categories may still contain misclassified instruments.*
[2] *Violins, Violas, Cellos, Basses, Banjos, Mandolins, Ukuleles, Dulcimers, Harps.*
[3] *Other Electronic Keyboards, Electronic Drums, Electronic Wind Instruments, etc. Figures for 1990, '89 and '88 may contain misclassified instruments.*
[4] *Accordions, Mouth Organs, Recorders, Bagpipes, Ocarinas, etc. 1990 U.S. Department of Commerce figure may contain misclassified or "toy" wind instruments.*
[5] *Fretted & Bowed String Instrument Parts and Accessories: Strings, Bridges, Bows, Tuning Pins, etc.*
[6] *Piano Parts & Accessories: Actions, Tuning Pins, Strings, Cut Case Parts, etc.*
[7] *Pipe & Reed Organ Parts & Accessories: Pipes, Reeds, Keyboards, etc.*
[8] *Electronic Instrument (Keyboard, Guitar, Drums, etc.) Parts & Accessories: Body and Case Parts, Frets, Keyboards, etc.*
[9] *Brasswind, Woodwind, Percussion Instrument Parts & Accessories. Also includes parts and accessories for other "musical instruments". Calliopes, Decoy Calls, etc.*
[10] *Metronomes, Tuning Forks, Pitch Pipes.*

1990 EXPORTS

The combined value of all exported electronic instruments rose 7% to $77 million, accounting for 30% of all U.S. musical instrument exports (compared to 32% in 1989).

Electric guitars dropped 1% to slightly more than 63,000 units valued at $15.1 million (a 1% increase). Japan was the leading customer.

Exported synthesizers/electric pianos increased in both units (up 15% to 72,000) and value (up 34% to $15.2 million). Shipments of other electronic instruments were off 15% in units to 741,000, but rose 3% in value to $47 million.

Exported acoustic guitars dropped 39% to 46,700 units valued at $13.3 million; a 19% increase. Japan was the leading customer, receiving 16,700 units (down 36% from 1989) valued at $5.5 million.

1990 U.S. Imports of Musical Instruments and Parts

KEY: *Figures readjusted by AMC to more accurately reflect exports. Harmonized System Numbers for each category appear below each category listing. All values in thousands of dollars.

Category	1990 Units	1990 Value	1989 Units	1989 Value	1988 Units	1988 Value	1990 Leading Sources
Pianos[1] (HS9201.10000/9201.20000)	64,674*	$ 125,996*	56,339*	$ 114,950*	77,384*	$ 150,785*	Japan
Harpsichords, Clavichords (HS9201.90000)	1,263*	$ 2,452*	3,800	$ 5,621	4,972	$ 5,171	S. Korea
Pipe Organs (HS9203.00400)	85	$ 6,296	352	$ 7,213	156	$ 9,582	Canada
Organs, Not Pipe & Electric (HS9203.00800)	1,941*	$ 1,223*	2,793*	$ 881*	9,362*	$ 1,265*	Italy
Violins, Violas, Cellos, Basses (HS9202.10000)	129,438	$ 9,181	143,519	$ 8,184	117,430	$ 7,966	W. Germany
Acoustic Guitars (HS9202.902/9202.90400)	452,130	$ 23,853	556,000	$ 27,504	681,967	$ 27,328	S. Korea
Electric Guitars (HS9207.90004)	390,828	$ 38,379	468,284	$ 32,025	485,135	$ 43,615	S. Korea
Other Stringed Instruments[2] (HS9202.90600)	200,733	$ 3,249	256,148	$ 3,031	143,801	$ 3,038	S. Korea
Brasswind Instruments[3] (HS9205.10008)	30,836	$ 9,451	36,226	$ 12,482	32,321	$ 10,784	Japan
Clarinets[4] (HS9205.90402)	40,484*	$ 3,841*	29,959	$ 4,384	19,928	$ 4,006	France
Saxophones (HS9205.90404)	43,111	$ 8,754	51,071	$ 12,057	32,145	$ 12,615	Taiwan
Other Wind Instruments[5] (HS9205.90406/9205.90408/9205.90600)	1,459,367	$ 6,553	1,619,638	$ 6,859	1,283,721	$ 7,338	Japan
Percussion Instruments[6] (HS9206.00200/9206.00400/9206.00800)	N/A	$ 36,514	N/A	$ 35,504	N/A	$ 31,125	Taiwan
Electronic Keyboards (1+ Keyboards)[7] (HS9207.100045/HS9207.100055)							
Under $200:	7,532	$ 363	22,047	$ 511	990,923	$ 31,526	
$200 and over:	22,443	$ 20,800	17,071	$ 15,388	11,787	$ 12,680	
	29,975	$ 21,163	39,118	$ 15,899	1,002,710	$ 44,206	Japan
Electronic Keyboards (1 Keyboard) & Other[8] (HS9207.100065/9207.100075)							
Under $100:	1,067,916	$ 36,550	2,380,689	$ 76,310	4,464,819	$189,574	
$100 and over:	366,452	$ 98,830	444,093	$ 101,161	405,566	$ 87,491	
	1,434,368	$135,380	2,824,782	$177,471	4,870,385	$277,065	Japan
Synthesizers (Keyboard Type)[9] (HS9207.100005/9207.100010)							
Under $100:	75,964	$ 1,069	120,638	$ 1,424	87,532	$ 2,562	
$100 and over:	47,596	$ 25,823	68,132	$ 35,762	76,253	$ 39,915	
	123,560	$ 26,892	188,770	$ 37,186	163,785	$ 42,477	Japan
Hand-Held Electronic Instruments[10] (HS9207.10006)	236,189	$ 1,702	219,395	$ 2,686	416,853	$ 6,858	Japan
Other Electronic Instruments[11] (HS9207.90008)	409,368	$ 14,010	406,189	$ 14,211	502,114	$ 33,844	Mexico
Accordions, Concertinas (HS9204.10400/9204.10800)	6,058*	$ 1,353*	10,485*	$ 1,481*	8,121	$ 1,497	Italy
Mouth Organs[12] (HS9204.20000)	183,535	$ 4,528	202,488	$ 4,054	175,881	$ 5,064	W. Germany
Instrument Strings[13] (HS9209.30000)	N/A	$ 4,751	N/A	$ 3,483	N/A	$ 3,885	Austria

continued on page 16

Acoustic piano exports were down 13% to 7,300 units, but posted a 1% increase in total value to $8.1 million. Canada imported the largest number of grands; 1,400 units valued at $1.4 million.

Exported woodwind instruments dropped 1% in units (to 83,000), but rose 4% in value to $17.8 million. The two leading customers – Canada and Japan—accounted for 36% of the total value and 32% of all units in this category. Brasswinds were reported up 8% in units (to 62,300) and off 1% in total value to $14.8 million. Canada was the leading customer (in terms of total value), importing brasswinds valued at slightly more than $3 million, a 55% increase compared to 1989.

Total value of exported percussion instruments increased 24% to $18.3 million, with Japan the leading customer. The Other Plucked and Bowed Strings category rose 11% to 107,000 units valued at $17.8 million, a 22% increase.

1990 IMPORTS

Although substantial declines were reported in 1990, electronic keyboards (with one keyboard) remained the leading import category with a total dollar value of slightly more than $135 million; a 24% drop from 1989.

Imported synthesizers (keyboard type) were down 35% to 123,600 units; total value dropped 28% to approximately $27 million.

Hand-held electronic instruments were up 8% in units, but down 37% in value during 1990.

Electric guitars posted a 16% decrease in units to 390,800, with a total value of $38 million; a 20% increase. Leading source was South Korea, importing approximately 250,000 units (up 9% from 1989) valued at $19.7 million (51% of the category's $38 million).

Acoustic pianos (the second largest import category in terms of total value) were reported at $126 million; a 9% increase over 1989. Unit shipments rose 13% to 64,700. Imported verticals represented 56% of total acoustic piano units shipped, and 30% of total value. Grands were up 5% in units to 26,500 and 12% in value to $90 million.

Imported acoustic guitars dropped 19% to 452,100 units valued at $25.9 million (compared to $27.5 million in 1989). Guitars not valued over $100 were down 22% in units and 15% in value. Guitars valued at $100 and over were up 19% in units and 16% in value.

Imported saxophones dropped 16% in units to 43,100 and 27% in total value to $8.8 million. Brasswind instruments were down 15% in units and 24% in value to $9.5 million, compared to $12.5 million in 1989; clarinets rose 35% in units, but were down 12% in value. Units in the Other Wind Instrument category were reported at 1,459,000 (a 10% decrease) valued at $6.6 million (down 4%). Violins, violas, etc., dropped 10% in units, but rose 12% in total value. Percussion instruments, the largest total value dollar category in this group, moved up 3% to $36.5 million.

1990 U.S. Imports of Musical Instruments and Parts *continued*

Category	1990 Units	1990 Value	1989 Units	1989 Value	1988 Units	1988 Value	1990 Leading Sources
Piano Parts, Accessories[A] (HS9209.91400/9209.91800)	N/A	$ 18,887	N/A	$ 19,345	N/A	$ 25,102	Mexico
Organ Parts, Accessories[B] (HS9209.93400/9209.93800)	N/A	$ 8,965	N/A	$ 9,554	N/A	$ 9,472	W. Germany
Fretted & Bowed String Instrs. Parts, Accessories[C] (HS9209.92200/9209.92400/9209.2600/9209.92800)	N/A	$ 15,477	N/A	$ 12,003	N/A	$ 17,449	W. Germany
Woodwind/Brass Instrument Parts, Accessories[D] (HS9209.99404/9209.99408)	N/A	$ 17,630	N/A	$ 15,997	N/A	$ 14,485	Japan
Percussion Instrument Parts, Accessories[E] (HS9209.99100)	N/A	$ 12,415	N/A	$ 13,245	N/A	$ 10,846	Taiwan
Electronic Instrument Parts, Accessories[F] (HS9209.94800/9209.94400)	N/A	$ 20,951	N/A	$ 27,485	N/A	$ 22,960	Japan
Other Instruments Parts, Accessories[G] (HS9209.99800)	N/A	$ 6,326	N/A	$ 5,034	N/A	$ 3,655	Taiwan
Other Accessories[H] (HS9209.10000)	N/A	$ 3,786	N/A	$ 2,939	N/A	$ 3,290	Japan
TOTALS	N/A	$591,958	N/A	$632,768	N/A	$836,780	

1990 IMPORT FOOTNOTES

[1] *Uprights & Grands.*
[2] *Banjos, Ukuleles, Mandolins & Other Fretted Instruments.*
[3] *Over $10 in value.*
[4] *May contain misclassified instruments.*
[5] *Flutes, Piccolos, Oboes, English Horns, Recorders, etc.*
[6] *Cymbals, Drums, Marimbas, Castanets, Triangles, etc.*
[7] *May contain misclassified instruments.*
[8] *May contain misclassified instruments.*
[9] *May contain misclassified instruments.*
[10] *Statistics as reported by U.S. Department of Commerce. May contain misclassified instruments.*
[11] *Instruments requiring amplification: Electronic Drums, Rhythm Machines, Electronic Wind Instruments, etc. Figures for 1988-90 may contain misclassified instruments.*
[12] *All totals in dozens.*
[13] *Strings for Bowed String and Fretted Instruments.*

[A] *Piano Parts and Accessories: Actions, Tuning Pins, Hammers, Strings, Cut Case Parts, etc.*
[B] *Organ Parts and Accessories: Pipes, Reeds, etc.*
[C] *Fretted and Bowed String Instrument Parts and Accessories: Bridges, Bows, Tuning Pins, etc.*
[D] *Brass and Woodwind Instrument Parts and Accessories: Mouthpieces, Horn Bells, Key Fittings, etc.*
[E] *Percussion Instrument Parts and Accessories: Mutes, Pedals, Dampers, etc.*
[F] *Electronic Instrument Parts and Accessories (for keyboard, electronic drum, electronic wind, etc.): Body and Case Parts, Frets, Keyboards, etc.*
[G] *Parts and Accessories for Other Instruments: Recorders, Accordions, Concertinas, etc.*
[H] *Metronomes, Tuning Forks and Pitch Pipes.*

Source: U.S. Dept. of Commerce, Bureau of Census, Foreign Trade Division

1990 NAMM Retailer Survey

During 1990, total net sales of musical instruments, sheet music and accessories rose 3.8 percent compared to 1989, as reported by music retailers around the U.S. who participated in the National Association of Music Merchants (NAMM) ongoing survey. Data is analyzed monthly by Industry Insights, Inc. of Columbus, Ohio.

Acoustic piano sales in 1990 were up 1.7 percent and organs were down nearly 9 percent.

Band and orchestra instruments were down 1 percent and percussion instruments were up 4.3 percent.

Fretted instruments posted a 2 percent decrease, sound reinforcement equipment gained 5 percent and electronic keyboards were up some 3 percent.

Instrument amplifiers (guitar, bass and keyboard) were down nearly 2 percent and signal processing and effects devices were down nearly 2 percent.

Printed music was up 1 percent and accessories were up 1 percent.

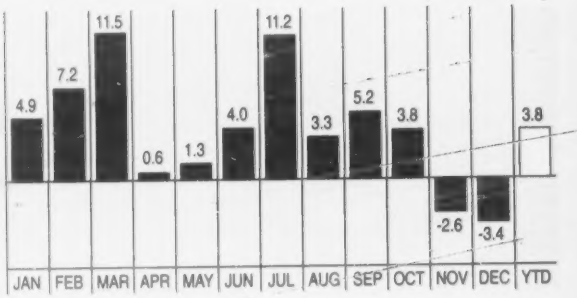
How to Read the Charts: On each of the following charts, 1990 total net sales in each product category are shown as the percentage of change from the same month of the prior year. It should be noted that dollar information has not been adjusted for inflation.

Further information about this music retailer survey is available from the National Association of Music Merchants, 5140 Avenida Encinas, Carlsbad, California 92008.

Total Net Sales

In Percent = Change from same month of prior year

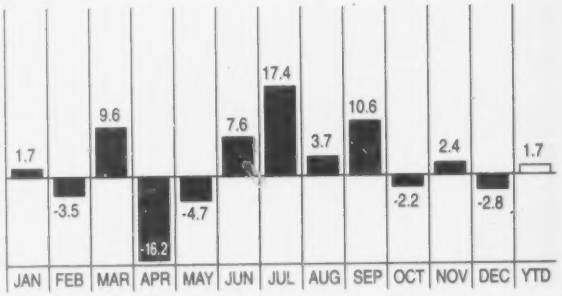
1990 Calendar Year: +3.8



Pianos

In Percent = Change from same month of prior year

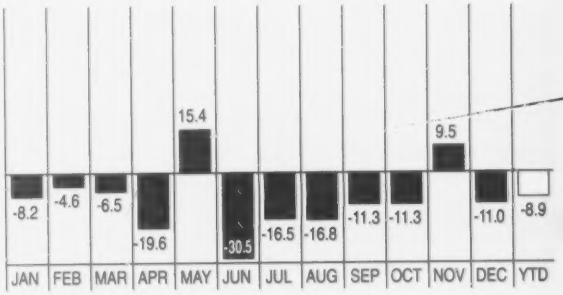
1990 Calendar Year: +1.7



Organs

In Percent = Change from same month of prior year

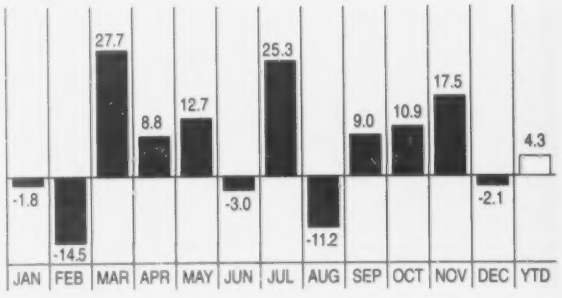
1990 Calendar Year: -8.9



Percussion

In Percent = Change from same month of prior year

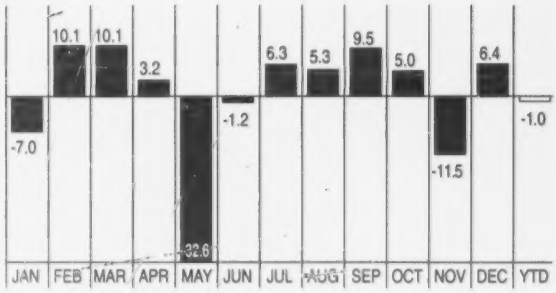
1990 Calendar Year: +4.3



Band and Orchestra Instruments

In Percent = Change from same month of prior year

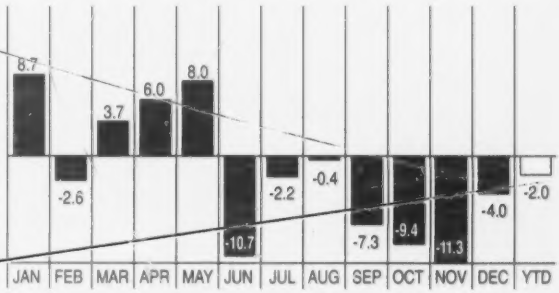
1990 Calendar Year: -1.0



Fretted Instruments

In Percent = Change from same month of prior year

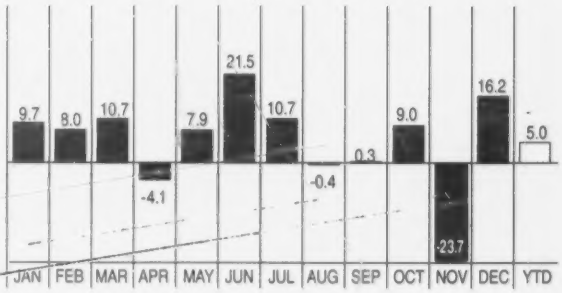
1990 Calendar Year: -2.0



Sound Reinforcement Equipment

In Percent = Change from same month of prior year

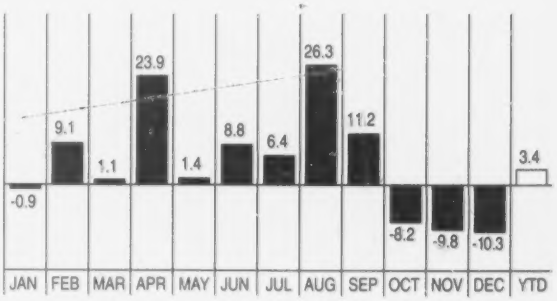
1990 Calendar Year: +5.0



Electronic Keyboards

In Percent = Change from same month of prior year

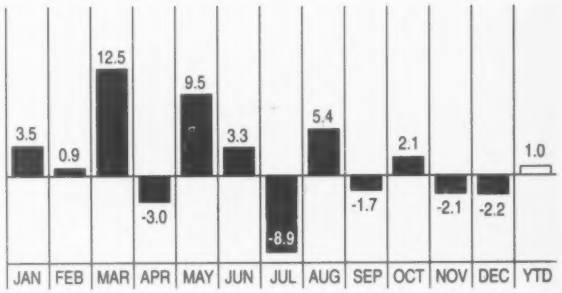
1990 Calendar Year: +3.4



Printed Music

In Percent = Change from same month of prior year

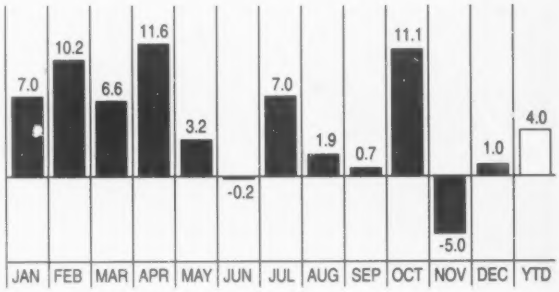
1990 Calendar Year: +1.0



Accessories

In Percent = Change from same month of prior year

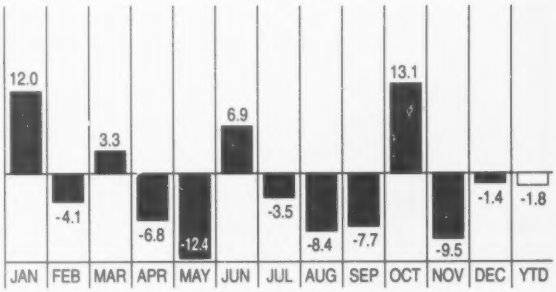
1990 Calendar Year: +4.0



Instrument Amplifiers
(Guitar, Bass & Keyboards)

In Percent = Change from same month of prior year

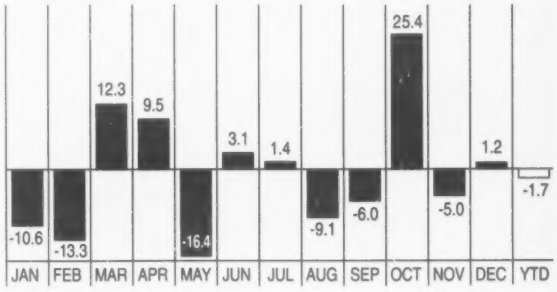
1990 Calendar Year: -1.8



Signal Processing and Effects Devices

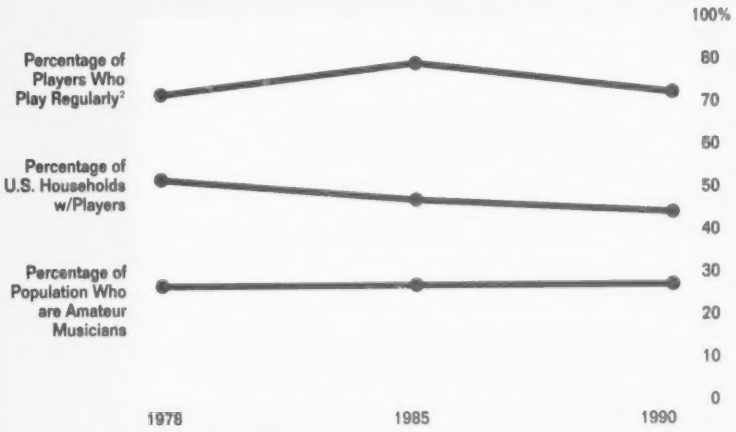
In Percent = Change from same month of prior year

1990 Calendar Year: -1.7



Base of U.S. Musical Households Declines, Yet Number of Amateur Musicians Remains Stable

Amateur Music Participation Trends 1978-1990[1]



[1] *Based on surveys by The Gallup Organization*
[2] *At least six times a year*

Age and Gender of Players vs. Non-Players

Age	Players	Former Players	Non-Players
5-17	29%	7%	26%
18-34	32	43	29
35-49	22	25	22
50+	17	25	20
Gender			
Male	48%	44%	54%
Female	52	56	46

More than one out of every four Americans (nearly 61 million people[1]) play a musical instrument, according to the newest nationwide survey of amateur instrumental musicians conducted for the American Music Conference by The Gallup Organization[2].

And, some 9.3 million households include a member who has used a computer to make music.

These are two of the highlights of the sixth national amateur music tracking study undertaken by AMC, and the third done by The Gallup Organization and underwritten by the National Association of Music Merchants (NAMM).

Player Households

According to the new survey, slightly more than four in ten (43%) U.S. households contain at least one amateur instrumental musician. In real numbers, this means that of the nation's 93.6 million households, some 40.2 million contain one or more instrumental music-makers; an increase of 2% from 1985, when the last AMC-sponsored Gallup survey projected approximately 39.3 million music-making households. This absolute increase is due to the growth in number of total U.S. households; the proportion of households with one or more amateur musicians has dropped from 51% in 1978, to 46% in 1985, to 43% in 1990. (Between 1985 and 1990, total U.S. population rose 5%, from 220.18 million to 230.88 million).

Projections based on 1990 survey data further indicate that the 40.2 million music-making households contain approximately 60.8 million[3] individual instrument players; 26% of the total U.S. population. This represents no change from the 1985 survey.

However, because the proportion of amateur musicians in the population has not declined along with the proportion of musical households, the survey suggests

that while there are fewer music-making households in 1990, they contain more amateur musicians than in the past.

CURRENT PLAYERS

As was found in AMC's 1985 survey, U.S. amateur musicians are slightly more likely to be female than male and tend to be under the age of 35; median age in both surveys was 28.

In general, amateur musicians come from households that also have a higher median income level ($45,860) than the total population ($37,640) and which are headed by an adult with more than a high school education.

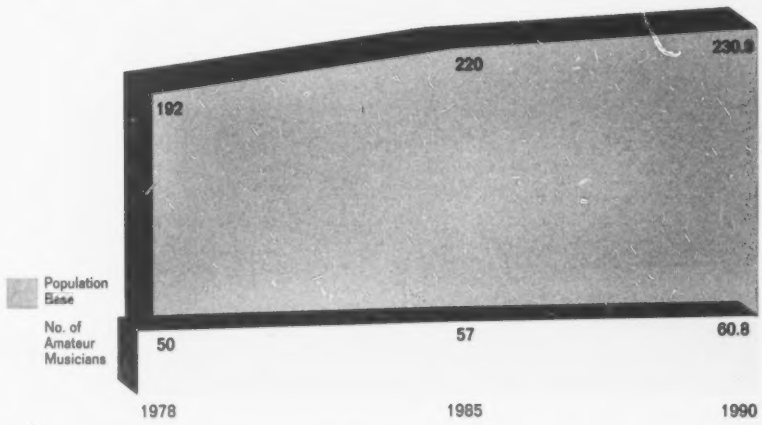
More than seven out of ten current players play their instrument(s) six or more times per year (the base used from which to further define frequency of play). Of this group, 49% play more than once a week; 20% play once a week; 21% play 1-3 times a month, and 7% less than once a month.

The top ten most popular instruments (in order) are the piano, guitar, flute, drums, clarinet, organ, trumpet, saxophone, violin and electronic keyboards. Instruments which moved up in popularity (compared to the 1985 survey) were flute, drums, saxophone and electronic keyboards. Moving down the top ten scale were organ and violin.

As was found in 1985, piano and guitar still top the list of instruments played. Compared to 1985, piano has experienced a small increase in playership. According to the 1990 survey, 40% of all players play the piano, compared to 36% in 1985.

Guitar playership, however, as tracked by this survey, fell sharply between 1985 and 1990; from 33% of all players to 17%. This drop contrasts with Music USA guitar shipment data showing increases over the past five years. While these findings appear to contradict each

Amateur Music Participation Trends 1978-1990[1]
(in millions)



[1] *Based on surveys by The Gallup Organization*

Age and Gender of Players in Player Households

	1990	1985
Age		
5-17	29%	24%
18-34	32	39
35-49	22	18
50 and older	17	16
No answer	—	3
Sex		
Male	48%	47%
Female	52	53

other, the differences trace to the nature of the data being collected. The Gallup survey tracks the proportion of Americans who say they play a particular instrument, while the Music USA category data reflect manufacturer shipments; instrument playership and instrument purchase are two very different measures. Taken together, these contrasting findings suggest that while fewer people are playing the guitar, those who do play may be purchasing more instruments, i.e., trading up, buying second instruments, or purchasing with the intent to learn to play.

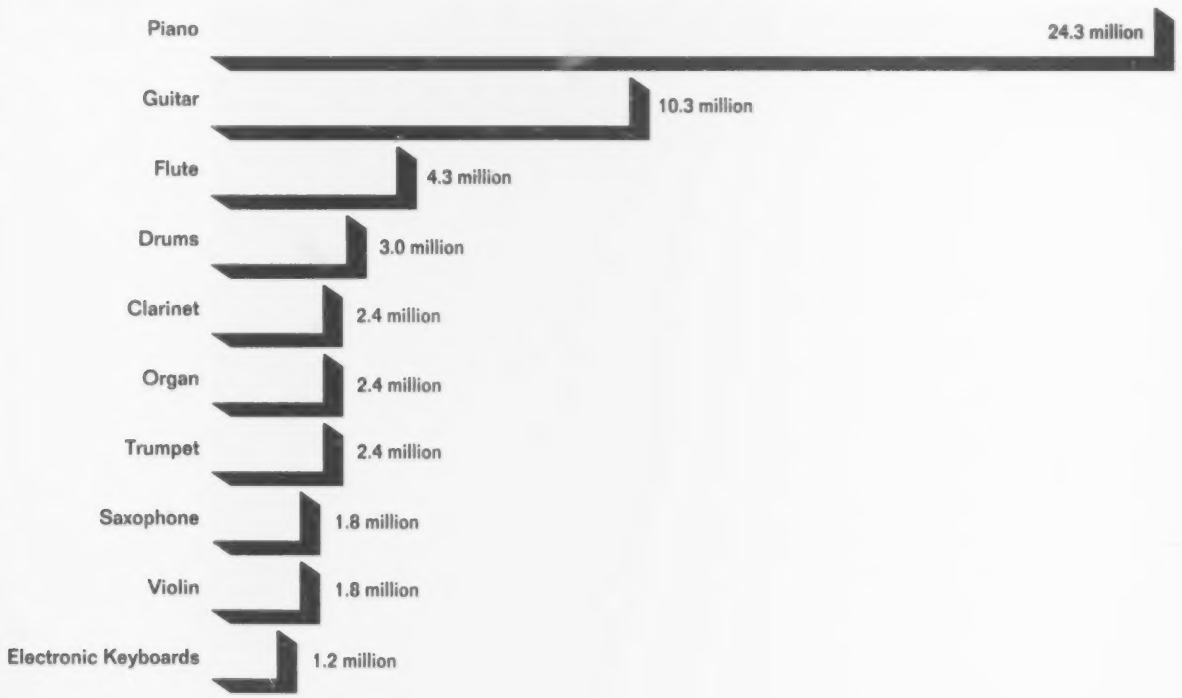
The survey also suggests an apparent lessening of "gender segregation" with respect to the types of instruments played by males and females. For the two instruments with large enough sample sizes to allow reliable comparisons, the change is marked. AMC's 1985 survey reported that 23% of piano players were male and 77% female, compared to 44% male and 56% female in 1990. In 1990, 51% of guitar players were reported to be male and 49% female, compared to 72% male and 28% female in 1985. This may be an indication of changing preferences among boys and girls choosing instruments for the first time. But it is undoubtedly also a reflection of who is dropping out of instrumental music participation.

FORMER PLAYERS

AMC's new survey also projected that 22.5 million American households (24% of the total) currently have former players in residence and 30.9 million households (33% of the total) contain residents who have never played.

Of the households where no one plays a musical instrument, a large minority (42%) have one or more members who used to play but quit. Former players were more likely to be female than male. Only a few former players (7%) were high school age or younger; a total of 43% of player dropouts were age 18-34. Piano, clarinet,

Instruments Amateurs Play



and guitar were the instruments most often played by former players.

While players and former players are more likely to be women, those who never learned to play are more likely to be men. Non-players do not differ significantly from players in age.

COMPUTERS AND MUSIC

Fully 71% of households in this survey contained at least one person who knows how to use a personal computer, and the majority of these households have two or more computer-literate members. More than one-quarter of households have a computer that is kept at home.

And, one in seven (9.3 million) of the computer-literate households surveyed reportedly include a member who has used a computer to make music. The household member who responded to the survey was the most common music-maker with the personal computer; tending to be male, younger and a resident of the South Central and North Central regions of the U.S.

[1] Error range for this figure is ± 3 percentage points at the 95% confidence level. The projection is based on 230,876,000 Americans five years of age or older.

[2] Telephone interviews were conducted with a nationally-representative sample of 1,002 adults, aged 18 years and older, during October 1990.

[3] Projections based on 93.6 million U.S. households. Error range for the actual number of players is ± 3 percentage points and ± 3 percentage points (1990) at the 95% confidence level.

1990 Demographic Profile of Musical Households

	Player Household	Total Sample
Education of Respondent		
High School or Less	29%	41%
Some College	33	28
College Grad or More	37	30
Annual Household Income		
Less than $20,000	13%	22%
$20,000–$39,999	29	29
$40,000–$59,999	25	22
$60,000 or More	25	19
No answer	8	8
Region		
Northeast	20%	21%
South Central	36	34
North Central	24	24
West	20	21
City Size		
Large Urban	16%	16%
Large Suburban	24	23
Smaller Community	34	34
Rural Area	26	26

Editor's Note: The American Music Conference wishes to acknowledge and thank the National Association of Music Merchants (NAMM) for its generous support of this survey.

For additional information about the survey or to order a complete written report, contact the American Music Conference, 303 E. Wacker Dr., Suite 1214, Chicago, IL 60601 or call (312) 856-8820.

DIRECTORY OF MUSIC-RELATED ASSOCIATIONS AND ORGANIZATIONS

(TRADE, EDUCATOR, RELIGIOUS, FRATERNAL, SERVICE, AND OTHER)

Please Note: For easier reference, directory listings under each category are alphabetical by *key* words, i.e. piano, singing, flute, etc.

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AMERICAN FEDERATION OF MUSICIANS
1501 Broadway Suite 600
New York, NY 10036
(212) 869-1330
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136 W. 21st St., 3rd Fl.
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(212) 924-9175
Promotes, encourages and fosters education and participation in band and orchestra instruments.

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8 Ardith Dr.
Normal, IL 61761
(309) 452-4257
Provides forum for exchange of ideas and impiements code of professional ethics.

RETAIL SHEET MUSIC DEALERS ASSOCIATION
4020 McEwen, Suite 105
Dallas, TX 75244-5019
(214) 233-9107
Promotes sheet music dealer/publisher relations; encourages music education and provides common ground for exchange of ideas.

NATIONAL ASSOCIATION OF SCHOOL MUSIC DEALERS
5801 W. 21st
Topeka, KS 66604
Services the musical needs of schools at all levels.

MUSIC ACHIEVEMENT COUNCIL
5140 Avenida Encinas
Carlsbad, CA 92008
(619) 438-8001
A joint council of the National Association of Music Merchants and National Association of Band Instrument Manufacturers dedicated to the retention of students in school band and orchestra programs.

MUSIC DISTRIBUTORS ASSOCIATION
136 W. 21st St.
New York, NY 10011-3212
(212) 924-9175
Association for musical instrument and accessory wholesalers, importers, or manufacturers.

INTERNATIONAL ASSOCIATION OF ELECTRONIC KEYBOARD MANUFACTURERS
136 W. 21st St., 3rd Fl.
New York, NY 10011-3212
(212) 924-9175
Association for electronic keyboard manufacturers.

CREATIVE AUDIO AND MUSIC ELECTRONICS ORGANIZATION
Route 2, Box 408
Meridian, MS 39305
(601) 485-7218
Represents professional audio and music electronics manufacturers and distributors.

GUITAR & ACCESSORIES MUSIC MARKETING ASSOCIATION
136 W. 21st St.
New York, NY 10011-3212
(212) 924-9175
Association for fretted instrument and/or related accessory manufacturers, distributors and others.

NATIONAL COUNCIL OF MUSIC IMPORTERS & EXPORTERS
136 W. 21st St.
New York, NY 10011
(212) 924-9175
Association for musical instrument and accessory importers and exporters; publishes import/export statistics, trade show and tariff schedules, and newsletters reporting worldwide government activities affecting international trade.

GUILD OF AMERICAN LUTHIERS
8222 S. Park Ave.
Tacoma, WA 98408
(206) 472-7853
Information exchange network for stringed instrument builders and repairers. Publishers of American Lutherie; instrument blueprints and biennial conventions.

NATIONAL ASSOCIATION OF MUSIC MERCHANTS
5140 Avenida Encinas
Carlsbad, CA 92008
(619) 438-8001, (800) 767-6266
Represents retailers, manufacturers and distributors of musical instruments, professional audio equipment and related music accessories. Also provides variety of educational, market development and support services, including management of two annual trade exhibitions.

INTERNATIONAL MIDI ASSOCIATION
5316 W. 57th St.
Los Angeles, CA 90056
(213) 649-6434
International MIDI (Musical Instrument Digital Interface) information network and official distributor of the MIDI 1.0 Detailed Specification.

INTERNATIONAL ASSOCIATION OF PIANO BUILDERS & TECHNICIANS
4510 Belleview, Suite 100
Kansas City, MO 64111
(816) 753-7747
International association for piano technicians.

PIANO MANUFACTURERS ASSOCIATION INTERNATIONAL
4020 McEwen
Suite 105
Dallas, TX 75244-5019
(214) 233-9107
Association representing the acoustic piano industry.

PIANO TECHNICIANS GUILD, INC.
4510 Belleview, Suite 100
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(816) 753-7747
Association for technicians specializing in tuning, maintenance, repair and rebuilding of fine pianos. Provides examinations for Registered-Tuner-Technician (RTT).

NATIONAL MUSIC PUBLISHERS ASSOCIATION
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(212) 370-5330
Association representing the music publishing industry.

EDUCATOR/SCHOOLS

ASSOCIATION OF PERFORMING ARTS PRESENTERS
1112 16th St., NW (#620)
Washington, DC 20036
(202) 833-2787
Professional association/service organization for performing arts presenting organizations.

COLLEGE BAND DIRECTORS NATIONAL ASSOCIATION
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University of Texas
Austin, TX 78713
(512) 471-5883
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AMERICAN COLLEGE OF MUSICIANS
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Austin, TX 78767
(512) 478-5775
Promotes music education with established standardized curriculum for piano teachers and students.

COLLEGE MUSIC SOCIETY
P.O. Box 18000
Boulder, CO 80308-8000
(303) 449-1611
Organization for college music teachers which gathers and disseminates information and ideas on music in higher education.

NATIONAL ASSOCIATION OF COLLEGE WIND & PERCUSSION INSTRUCTORS
Division of Fine Arts
Northeast Missouri State University
Kirksville, MO 63501
Provides communications forum for college, university and conservatory wind and percussion teachers.

MUSIC EDUCATORS NATIONAL CONFERENCE
1902 Association Dr.
Reston, VA 22091
(703) 860-4000
Educational association dedicated to advancement of all aspects of music education in the schools from pre-kindergarten through graduate studies. Membership includes teachers, administrators, music supervisors.

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Auxiliary organization of the Music Educators National Conference which serves the mutual interests of the industry and educators through exchange of ideas, development of code of ethics, and maintenance of the highest level of business procedures at conventions and in advertising and all relations with the public.

ORGANIZATION OF AMERICAN KODALY EDUCATORS
Music Department
Nicholls State University
Box 2017
Thibodaux, LA 70310
(504) 448-4602
Organization for public and private teachers, students, administrators and others who support the Kodaly teaching method.

NATIONAL GUILD OF COMMUNITY MUSIC SCHOOLS
40 N. Van Brunt St., Suite 32
Englewood, NJ 07631
(201) 871-3337
Association of nonprofit, nondegree community schools of the arts that offer instruction to people of all ages and ability.

NATIONAL SCHOOL ORCHESTRA ASSOCIATION
345 Maxwell Dr
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(412) 882-6696
Supports elementary, junior and senior high school and university instrumental music teachers dedicated to development of school orchestra programs.

COUNCIL FOR RESEARCH IN MUSIC EDUCATION
1205 W. California
Urbana, IL 61801
(217) 333-1027
Organization for scholars and institutions interested in advancing the cause of research in music teaching and learning.

NATIONAL ASSOCIATION OF SCHOOLS OF MUSIC
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Provides accreditation, statistical services, policy analysis and administrative development for programs preparing professional musicians, teachers and music services personnel.

NATIONAL COUNCIL OF STATE SUPERVISORS OF MUSIC
c/o Linda Mercer
Ohio Department of Education
65 Front St.
Columbus, OH 43266-0308
(614) 466-2211
Advisory body to the National Association of Music Educators' National Executive Board with membership open to anyone responsible for music in a state or territory department of education and a member of MENC. Goal is to develop and strengthen music education in the U.S. and its territories.

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Promotes and encourages professional and amateur string (including guitar and harp) and orchestra study, performance, teacher education, research and pedagogy.

SUZUKI ASSOCIATION OF THE AMERICAS
P.O. Box 354
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(319) 263-3071
Organization of teachers, parents and educators interested in and dedicated to advancement of the Suzuki Method in the western hemisphere

MUSIC TEACHERS NATIONAL ASSOCIATION
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Cincinnati, OH 45202-2434
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WOMEN BAND DIRECTORS NATIONAL ASSOCIATION
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NATIONAL CATHOLIC BANDMASTERS ASSOCIATION
Box 1023
Notre Dame, IN 46556
(219) 239-7136
Organization representing Catholic school instrumental music teachers which promotes qualitative & quantitative growth of Catholic school band programs.

CHRISTIAN INSTRUMENTAL DIRECTORS ASSOCIATION
P.O. Box 601
Cedarville, OH 45314
Designed to meet the needs of private, church-related school band and/or orchestra directors and church music directors interested in using instruments in worship.

STANDING COMMISSION ON CHURCH MUSIC OF THE EPISCOPAL CHURCH
815 Second Ave.
New York, NY 10017
(212) 867-8400
Undertakes research and development of musical resources (eg. hymnals), guidelines and educational materials for Episcopal liturgical music.

PRESBYTERIAN ASSOCIATION OF MUSICIANS
1000 E. Morehead St.
Charlotte, NC 28204
(No Telephone)
Association which cooperates with Presbyterian Church (USA) agencies and offers assistance in worship, music and the arts.

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2990 Glenora Lane
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Association of professional church musicians and supporters united to enhance the quality of U.U. music and musicians.

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CATGUT ACOUSTICAL SOCIETY
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An international organization devoted to research in the theory, design, construction and history of stringed instruments and to related areas of acoustical study.

AMERICAN MUSIC CENTER
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Promotes the recognition and performance of contemporary American music.

CHINESE MUSIC SOCIETY OF NORTH AMERICA
One Heritage Plaza, Suite 335
Woodridge, IL 60517
(708) 910-1551
Devoted to promotion and research of Chinese music by providing public concerts, recitals, lectures, exhibitions, recordings.

AMERICAN CHORAL FOUNDATION
administered by Chorus America
2111 Sansom St.
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(215) 563-2430
Promotes research into performances of established choral works and discovery of unpublished, unknown choral works. Publisher of *The American Choral Review* & *Research Memorandum Series*.

INTERNATIONAL FEDERATION FOR CHORAL MUSIC
College of Music CB301
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Association of choral organizations and individuals dedicated to fostering choral music and activities throughout the world.

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